



# XYZ INC

## OPPORTUNITY ZONE PROSPECTUS

XYZ OZ FUND: 801-555-5555, info@xyzfund.com

### About the Deal

DESCRIPTION OF THE OPPORTUNITY- WHAT IS THE PROJECT, WHO IS BEHIND IT, AND WHAT IS THE EXPECTED OUTCOME.

#### XYZ, Inc.

- OVERVIEW OF THE COMPANY
- RELEVANT DATA POINTS
- GEOGRAPHICAL PROFILE
- MARKET SIZE
- OPPORTUNITY



#### XYZ, Inc.

#### Team

- WHO IS THE TEAM
- MISSION STATEMENT
- PAST PROJECTS
- MAJOR SUCCESSES
- STRATEGIC PARTNERS
- FINANCING PARTNERS
- OTHER



### Operational Plan and Timeline

#### PHASE I

- KEY STEPS
- PRE-WORK- e.g., IDENTIFYING LAND, COMPANY, OR WHAT IS BEING PURCHASED

#### PHASE II

- KEY STEPS
- "GETTING UP AND RUNNING" PHASE

#### PHASE III

- KEY STEPS
- SCALE PHASE

#### PHASE IV- EXIT

- KEY STEPS
- WHAT IS THE EXIT?

### MARKET AND INDUSTRY OVERVIEW

WHAT IS THE MARKET SIZE FOR THE OPPORTUNITY? WHAT IS THE STRATEGIC AND COMPETITIVE ADVANTAGES TO THIS PROJECT? WHAT IS THE TOTAL ATTAINABLE MARKET SHARE?

### Financial Snapshot and Team

#### KEY DATA POINTS

#### Deal Capitalization (\$000s)

#### XYZ INC Facility 1

OZ Equity Financing	8,000,000
LTV Debt (80%)	35,000,000
Other Capital Sources (NMTC)	4,500,000
<b>Total Project Cost</b>	<b>47,500,000</b>



John Doe

- 25+ years experience
- JD/MBA



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### About the Deal

XYZ Manufacturing is a strategically located, state-of-the-art, multi-use facility designed to serve sophisticated supply chain and distribution networks in the food logistics process. XYZ provides storage for seasonally produced food for year-round availability, short-term storage meeting retail distribution needs, and storage of imports and exports for global transportation.

#### XYZ, Inc.

- Seeking to build first facility- 30,000 square feet in Tremonton, Utah
- Ideally located at the crossing of two major interstates- I-15 and I-84
- Seeking to operate in the fast growing cold storage and warehousing market which is growing at 35% annually since 2013
- Market size was \$6.5bn as 2019, with no major operators in the Intermountain West



#### XYZ, Inc.

- XYZ Opportunity Zone Fund ("the OZ Fund") will build upon the pioneering work of John Doe and Jane Doe from their previous industry experience
- XYZ OZ Fund is a mission-driven real estate investment firm whose key principals are recognized leaders in the logistics and transportation industry

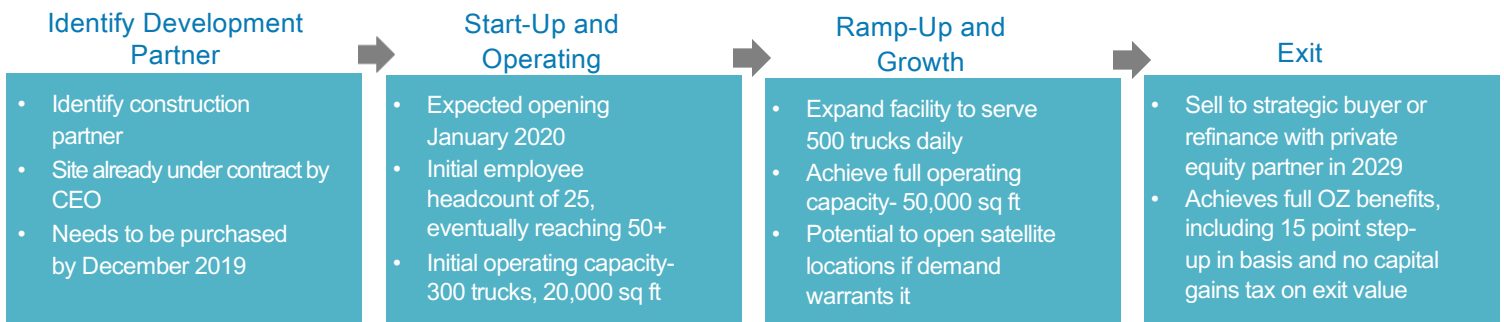


#### Team

- Extensive experience in urban development, cold storage, and construction management
- Identified, acquired, financed, and constructed over 15 cold storage facilities totaling over 1,000,000 square feet.



### Operational Plan and Timeline



### Why Cold Storage and Trucking Storage Logistics

The cold storage and warehouse logistics industry is currently experiencing unprecedented growth. With the market growing at 35% annually since 2013 and reaching \$6.5bn in 2019, the need for storage is only growing. Within the intermountain west region, there are only four current operators of cold storage, none of which are over 10,000 sq ft. With an estimate yearly demand of 100,000 sq ft., there is a clear need for a new entrant to service demand.

### Financial Snapshot and Team

- \$47.5M project
- \$8M OZ investment
- XYZ OZ LLC is QOZF

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